

WASHINGTON STATE CHARTER SCHOOL COMMISSION: REQUEST FOR PROPOSALS FOR SCHOOLS OPENING IN THE 2015-2016 SCHOOL YEAR

Issue Date: April 15, 2014

Due Date: July 15, 2014 5:00PM PDT

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Introduction

The Washington State Charter School Commission (Commission) was created in 2013, after the approval of Initiative 1240, to serve as a statewide charter school authorizer. The nine-member Commission is tasked with running a process to approve new charter schools, and effectively monitoring the schools it authorizes through ongoing oversight. Per the Act, the Commission has established its strategic vision for authorizing to guide its work:

The Washington State Charter School Commission seeks to authorize high quality schools that will significantly improve student outcomes, particularly for at-risk students. The Commission will hold schools accountable for student learning using multiple measures of student achievement.

The Commission seeks to build a diverse portfolio of school delivery models that expands the authority of teachers and school leaders and encourages and accelerates the identification and use of best practices in teaching and learning. It also seeks to develop, test, and document innovative, new ideas that can be replicated in other Washington schools.

The Commission expects schools to have authentic and sustainable connections to the communities they serve. These connections are evidenced by strong commitments from community and business stakeholders, systems for ensuring cultural sensitivity, responsiveness to all students and their families, and effective, engaged governance boards.

The Charter Schools Act requires the Commission to annually issue a Request for Proposals (RFP) to open new charter schools. Through the issuance of this RFP the Commission seeks proposals to open new high-quality charter schools that are aligned with its strategic vision throughout the state of Washington. To that end, the Commission has worked closely with a national third-party, the National Association of Charter School Authorizers (NACSA), to develop a rigorous, thorough, and transparent response and review process.

Eligibility

Only schools that plan to open and serve students in the 2015-2016 school year are eligible to respond to this RFP.

By law, only nonprofit organizations may operate charter schools in the state of Washington. An Applicant must be either a public benefit nonprofit corporation as defined in RCW 24.03.490, or a nonprofit corporation as defined in RCW 24.03.005 that has applied for tax exempt status under section 501(c)(3) of the Internal Revenue Code of 1986 (26 U.S.C. Sec. 501(c)(3)). The nonprofit corporation may not be a sectarian or religious organization and must meet all of the requirements for a public benefit nonprofit corporation before receiving any funding under RCW 28A.710.220.

Additionally, contracts for management operation of a charter school may only be with nonprofit organizations. Contracts with education service providers for substantial educational services, management services, or both, must also be with a nonprofit organization.

Proposals will be reviewed for satisfaction of the eligibility requirements (see Completeness Review, below). If these eligibility requirements are not met, the Proposal may be summarily rejected.

Administrative Requirements

Reservation of Rights

The Commission reserves the right to reject any and all proposals for any reason, reissue the RFP, or cancel the RFP, as deemed appropriate by the Commission. Applicants are expected to review this RFP closely; revisions have been made to process and in content.

Proper Communication

Upon release of this RFP, all Applicant communications must be directed to the RFP Coordinator. Unauthorized contact with other state employees or representatives may result in disqualification. All oral communications will be considered unofficial and non-binding. Applicants should rely only on written statements issued by the RFP Coordinator.

Colin Pippin-Timco, RFP Coordinator
Washington Charter School Commission
PO Box 40996
Olympia, WA 98504-0996

Telephone: 360.725.5511
E-mail: Colin.Pippin-Timco@charterschoolwa.gov

Applicant Questions and Complaints

Applicant questions regarding this RFP will be allowed consistent with the *Timeline*. All questions must be submitted in writing (e-mail acceptable) to the RFP Coordinator. Official written Commission responses will be provided for questions received by the deadlines, and will be posted at: <http://www.governor.wa.gov/issues/education/commission/> and <https://wscsc-charterapp.fluidreview.com/res/>.

Applicants submitting questions will not be identified. Verbal responses to questions will be considered unofficial and non-binding. Only written responses posted to the Commission web site listed above will be considered official and binding.

Applicants are encouraged to review the requirements of this RFP carefully, and submit any comments and recommendations to the RFP Coordinator. Where requirements appear to prohibit or restrict an organization's participation, an explanation of the issue with suggested alternative language should be submitted in writing to the RFP Coordinator by the deadline for Applicant Questions and Comments in the *Timeline*.

Applicants are expected to raise any questions, exceptions, or requested additions they have concerning the RFP requirements early in the RFP process. Applicants may submit specific complaints to the RFP Coordinator if the Applicant believes the RFP contains inadequate or improper criteria, or that the proposal evaluation process unnecessarily restricts competition, is flawed or unfair. The complaint must be made in writing to the RFP Coordinator before the due date set forth in the *Timeline*. The Complaint should clearly articulate the basis for the complaint and include a proposed remedy. Complaints already raised may not be raised again during the Protest process described below.

The RFP process will continue while complaints are being reviewed and responses are presented.

Should an Applicant complaint identify a change that would be in the best interest of the State to make, the Commission may modify this RFP accordingly. The modification to the RFP will be in writing and made in the form of an amendment to the RFP.

The Commission's decision on a complaint is final and no further administrative appeal is available.

Delivery of Proposals

The proposal, in its entirety, must be received by Commission no later than 5:00 P.M. PDT on July 15, 2014. All Proposals must be submitted using the Review Room platform, with hard copies mailed to the RFP Coordinator. Submissions are time stamped when the submissions are uploaded to Review Room. No submissions will be accepted after the deadline.

Applicants should allow sufficient time to ensure timely receipt of the proposal by the RFP Coordinator. Late submissions will not be accepted and will be automatically disqualified from further consideration.

The Commission assumes no responsibility for delays caused by Applicant's technical difficulties, network problems or any other party.

All proposal documents submitted in hard copy become the property of the Commission and will not be returned.

No facsimile transmissions will be accepted at any point in the process.

Proposal Contents

The Proposal must contain information responding to all requirements in the RFP. Applicant Certification and Assurances with Applicant's exceptions and/or proposed revisions to the Proposed Master Contract must be attached, if applicable. The Proposal and all documents that require a signature must be signed, or have an electronic verification, by an authorized Applicant representative.

Failure to provide any information or required signatures may result in disqualification of the Proposal.

Proposal Format and Organization

Proposals must be written in English and submitted using the Review Room platform.

Documents requiring signatures must be signed by a representative authorized to bind the Applicant to their proposal. Documents that require signatures should be properly signed, completed, and scanned into a separate file in *.bmp*, *.jpg*, *.tiff* or PDF format.

Response/answers should be clearly linked to the RFP sections to which they pertain. Applicants should follow the numbering scheme used in the RFP.

Cost of Proposal Preparation

The Commission will not reimburse Applicants for any costs associated with preparing or presenting a Proposal.

Proposal Property of the Commission

All materials submitted in response to this RFP become the property of the Commission. The Commission has the right to utilize any of the ideas presented in any material offered. Selection or rejection of a Proposal does not affect this right.

Proprietary or Confidential Information

Any information in the proposal that the Applicant desires to claim as proprietary and exempt from disclosure under the provisions of Chapter 42.56 RCW, or other state or federal law that provides for the nondisclosure of the Applicant's document, must be clearly designated. Each page containing the information claimed to be exempt from disclosure must be identified by the words "Proprietary Information" printed on the lower right hand corner of the page. **Marking the entire proposal as proprietary, confidential, or exempt from disclosure will not be honored.** Applicants must state clearly if it contains any proprietary or confidential information, as well as reasons that this information may be considered proprietary.

To the extent consistent with Chapter 42.56 RCW, the Public Disclosure Act, the Commission shall maintain the confidentiality of Applicant's information marked confidential or proprietary. If a request is made to view proprietary information, the Commission will notify the Applicant of the request and of the date that the records will be released unless the Applicant obtains a court order enjoining that disclosure. If the Applicant fails to obtain the court order enjoining disclosure, the Commission will release the requested information on the date specified.

The Commission's sole responsibility shall be limited to maintaining the above data in a secure area, and to notify the Applicant of any request(s) for disclosure for so long as the Commission retains the Applicant's information in Commission records. Failure to label such materials, or failure to timely respond after notice of request for public disclosure has been given, shall be deemed a waiver by the Applicant of any claim that such materials are exempt from disclosure.

Due Diligence

The decision to approve a proposal to open and operate a public charter school requires a thorough vetting of the applicant. The Commission may engage in due diligence to verify and evaluate the information submitted as part of the evaluation process. Due diligence may include, but is not limited to:

1. Contacting individuals who may have knowledge about the information submitted and/or individuals associated with the applicant organization in order to evaluate the accuracy and validity of the information provided in the proposal.
2. Review of information and documentation obtained from external sources in order to evaluate the accuracy and validity of the information provided in the proposal.

Relevant information gleaned through this due diligence process will be reduced to writing in a due diligence report and provided to the evaluation team and the Commission for use in determining whether the proposal meets the criteria for approval.

Completeness Review

All Proposals will be reviewed for completeness before they are accepted and distributed to evaluation teams. If a Proposal is found to be incomplete or incorrectly formatted, the Applicant will have 24 hours to satisfactorily rectify the identified issues and resubmit their Proposal. Similarly, if it appears from the face of the Proposal that the Applicant does not meet the eligibility requirements, the Applicant will be given 24 hours to satisfactorily rectify the identified issues and resubmit their Proposal.

Failure to rectify any identified issue(s) within the allotted time will result a finding of incomplete and the application will be disqualified from further review; Applicants are welcome to reapply in future years.

Waiver of Minor Administrative Irregularities

The Commission reserves the right to waive minor administrative irregularities contained in any Proposal.

Errors in Proposal

Applicants are liable for all errors or omissions contained in their Proposals. Applicants will not be allowed to alter proposal documents after the deadline. The Commission is not liable for any such errors. The Commission reserves the right to contact the Applicant for clarification of proposal contents; including through the interview process.

Misrepresentations on Application

A Proposal containing a material misrepresentation in the information or documentation submitted may be denied. A material misrepresentation includes, but is not limited to, one that is inaccurate or misleading, or a representation that, if accurately reported, could impact the rating that an Applicant would receive on any applicable criteria.

Amendments and Revisions

The Commission reserves the right to revise the Timeline or other portions of this RFP at any time. The Commission may correct errors in this document (identified either by the Commission or an Applicant. Any changes or corrections will be by one or more written amendment(s), dated, and posted with this RFP at <http://www.governor.wa.gov/issues/education/commission/> and <https://wscsc-charterapp.fluidreview.com/res/>.

Applicants are responsible for checking this site for changes and should do so frequently. The Commission will not be responsible for notifying Applicants of changes in any other manner. All changes must be authorized and issued in writing by the RFP Coordinator. If there is any conflict between amendments, or between an amendment and the RFP, whichever document was issued last in time shall be controlling.

No Obligation to Contract

The Commission reserves the right to refrain from selecting or contracting with any and all Applicants.

Withdrawal of Proposal

Applicants may withdraw a proposal that has been submitted at any time up to the Proposal due date and time (identified on the *Timeline*). To accomplish Proposal withdrawal, a written request signed by an authorized representative of the Applicant must be submitted to the RFP Coordinator.

Failure to respond to the Commission according to the *Timeline* below, or failure to respond to an inquiry or communication from the Commission to the Applicant's designated representative, shall be deemed a withdrawal.

Optional Applicant Debriefing Conference

Applicants whose Proposals are not approved by the Commission may request an optional debriefing conference to discuss the evaluation of their Proposal within the date range specified in the *Timeline*. The request must be in writing (e-mail acceptable) and addressed to the RFP Coordinator.

The purpose of this debriefing is to discuss the factors considered in the evaluation of the proposal, and address questions and concerns about the Applicant's performance with regard to the RFP requirements. This conference will not include any discussion of or comparison to proposals from any other applicant.

Protest Procedures

Only applicants whose proposals are not approved by the Commission AND who participate in a debriefing conference may make protests. Upon completion of the debriefing conference, the Applicant will have five business days to file a formal protest of the RFP with the RFP Coordinator.

Protests must be received by the RFP Coordinator no later than 5:00 PM PDT on the fifth business day following the debriefing. Protests may be submitted by e-mail but must be followed in hard copy by the document with an original signature.

In the event a protest may affect the interest of another Applicant that also submitted a proposal, such Applicant will be given an opportunity to submit its views and any relevant information on the protest to the RFP Coordinator.

1. Applicants submitting protests shall follow the procedures described below. Protests that do not follow these procedures will not be considered. This protest procedure constitutes the sole administrative remedy available to Applicants. All protests must be in writing, addressed to the RFP Coordinator, and signed by the protesting party or an authorized Agent.
 - a. The protest must state the RFP number, the grounds for the protest with specific facts and complete statements of the action(s) being protested.
 - b. A description of the relief or corrective action being requested should also be included.
2. Only protests stipulating an issue of fact concerning the following subjects will be considered:
 - a. A matter of bias, discrimination or conflict of interest on the part of an evaluator.
 - b. Non-compliance with procedures described in the RFP or Commission policy.

3. Protests not based on these procedural matters will not be considered.
4. Protests will be rejected as without merit if they address issues such as:
 - a. An evaluator's professional judgment on the quality of a proposal.
 - b. The Commission's assessment of its own and/or other agencies or communities' needs or requirements.
5. Upon receipt of a protest, a protest review will be held by the Commission. The Commission will assign responsibility for responding to the protest to a person who was not involved in the RFP or evaluation process.
6. The Commission will consider the record and all available facts, and issue a decision; the decision must be issued within five business days of receipt of the protest. If additional time is required, the protesting party will be notified of the delay.

The final determination of the protest shall:

1. Find the protest lacking in merit and uphold the Commission's action, denying the protest; or
2. Find only technical or harmless errors in the RFP and evaluation process and determine the Commission to be in substantial compliance, denying the protest; or
3. Find merit in the protest and provide the Commission options which may include:
 - a. Correcting the errors and reevaluating all proposals;
 - b. The reissue of the RFP and conducting a new process; and/or
 - c. The making of other findings and the determination of other courses of action as appropriate.

Notification of Commission Decisions

All Applicants will be notified by e-mail after a decision has been made. The date of notification will be the date the e-mail is sent.

Electronic Availability

The contents of this RFP and any amendments or revisions and written answers to questions will be available at <http://www.governor.wa.gov/issues/education/commission/> and <https://wscsc-charterapp.fluidreview.com/res/>. **Applicants are responsible for checking this site for notices and changes and should do so frequently.**

Revisions to the RFP

In the event it becomes necessary to revise any part of this RFP, addenda will be published on <http://www.governor.wa.gov/issues/education/commission/> and <https://wscsc-charterapp.fluidreview.com/res/>. For this purpose, the published questions and answers and any other pertinent information shall be provided as an addendum to the RFP and will be placed on the website.

The Commission also reserves the right to cancel or reissue the RFP in whole or in part, prior to execution of a contract.

Minority and Women-Owned Business Participation

In accordance with chapter 39.19 RCW, the Commission encourages participation in proposals in response to this RFP by organizations certified by the Office of Minority and Women's Business Enterprises (OMWBE), on a direct or subcontractor basis. However, no preference for proposals including such organization will be given in the evaluation of proposals, no minimum level of OMWBE participation shall be required as a condition for approval of a charter, and proposals will not be rejected or considered non-responsive on that basis.

Instructions and Guidelines

Opening a new charter school that is prepared to be successful on day one requires investment in a thoughtful process to address the requirements to ensure a highly effective charter school. This RFP requires information that will allow the Commission to consider and determine if the proposal presents a school that is sufficiently well planned and researched, and that it not only has a compelling and rigorous academic model, but is fiscally and operationally sound as well. This RFP also seeks information that will allow the Commission to assess the capacity of the founding team to successfully implement the proposed plan.

In order for a thorough and rigorous review to occur, all Applicants must respond to all questions and requests for information contained in this RFP. Failure to address all questions may result in the Proposal being deemed incomplete.

Applicants are encouraged to reference the Evaluation Criteria when preparing their Proposals to ensure that the responses not only answer the items below, but also address all of the criteria. For information on how approved schools will be evaluated once they have opened, Applicants should reference the Commission's performance framework (Chapter 108-30 WAC), which is available on the website and incorporated by reference.

All Applicants must submit a Notice of Intent to Apply (NOI), using prepared using the template provided by the Commission, no later than 5:00PM PDT on June 13, 2014 to the RFP Coordinator by email, postal service, or hand delivery.

Proposals must be submitted no later than **5:00pm PDT on July 15, 2014**. Commission rules governing the proposal and approval process (Chapters 108-10 and 108-20 WAC) are incorporated by reference and available on the Commission's website. All Applicants must initially submit their proposals electronically. For the 2014 RFP, all electronic submissions must be uploaded to the online portal, hosted by Fluid Review at <http://wscsc-charterapp.fluidreview.com>, by the deadline. Orientation sessions for potential applicants and other interested parties will be conducted via webinar on May 19 and June 18, 2014. It is *strongly* encouraged that all prospective applicants attend one of these sessions.

Components of the Application

- **Narrative Proposal:** The Proposal is the formal application to the Commission, and is a comprehensive description of the school's educational, organizational, and financial plans.
- **Attachments:** Throughout the application, specific documents are requested in addition to narrative answers. Attachments may not contain additional narrative unless specified. A comprehensive list of the attachments is provided below.
- **Capacity Interview:** Applicants will have the opportunity to present their plan and demonstrate the team's capacity to open and maintain a high-quality charter school as well as to answer specific questions about their proposal.

Electronic Submission Instructions

1. **The online portal, with template documents and instructions, will be available no later than April 15, 2014.** The Applicant will upload each element of the proposal (cover sheet, narrative, attachments, etc.) separately.
2. Upload each document to the online portal at <http://wscsc-charterapp.fluidreview.com>. **Be sure to upload the documents in the file format specified.** An overview of how to use Fluid Review will be included in the orientation sessions.
3. Applicants may SUBMIT their proposals only after uploading all required documents. Fluid Review will not enable the SUBMIT command until all requirements are met.
4. Once the system has accepted the SUBMIT command, the proposal will be both submitted and locked. The Applicant will not be able to make additional revisions.
5. **Fluid Review will automatically shut down access to all proposals at 5:00PM PDT on July 15, 2014.** Proposals not SUBMITTED, including proposals that are partially uploaded, will not be accepted.

Once the electronic submission is received and a completeness determination has been issued, all applicants proceeding in the evaluation process must submit **one original and 9 identical photocopies of the proposal AND one redacted electronic copy (in PDF form) to the RFP Coordinator.** The redacted electronic document should omit personal telephone numbers, email addresses, home addresses, and signatures, as well as check images and receipts.

Hard Copy Preparation Instructions

1. All application documents should be printed on STANDARD, WHITE, LETTER SIZED PAPER, DOUBLE SIDED.
2. All application documents should be bound in a 3-ring binder.
3. Attachments should be offset with labeled tabs.
4. **Hard copies and the redacted electronic copy should be submitted to:**

Postal/Courier Service:
Colin Pippin-Timco, RFP Coordinator
Washington Charter School Commission
PO Box 40996
Olympia, WA 98504-0996

Hand Delivered:
Colin Pippin-Timco
1068 Washington St.
Olympia, WA 98501

Specifications

1. Applicants MUST submit proposals electronically through the Fluid Review portal and must use

the following templates (available on the Resources page of the Fluid Review portal):

- a. Proposal Coversheet -ALL APPLICANTS (MS Word Document);
- b. Proposal Narrative Template-ALL APPLICANTS (MS Word Document);
- c. Staffing Chart Template-ALL APPLICANTS (MS Word Document);
- d. Charter School Board Member Information Sheet Template-ALL APPLICANTS (MS Word Document);
- e. Financial Plan Workbook-ALL APPLICANTS (MS Excel Document);
- f. Portfolio Summary Template-EXISTING OPERATORS ONLY (MS Excel Document);
- g. Background check authorization - ALL APPLICANTS (MS Excel Document); and
- h. Statement of Assurances- ALL APPLICANTS (MS Excel Document).

2. All page limits must be followed. Proposals exceeding the stated page limits will be rejected.

3. All elements of the proposal must be typed with 1-inch page margins and 12-point font, single-spaced, in the designated spaces in the templates.
4. Each major section of the proposal (Executive Summary, Education Program, etc.) must begin on a separate page, as indicated in the template document.
5. If a particular question does not apply to the Applicant team or proposal, respond “Not Applicable,” AND state the rationale.
6. All required attachments should be uploaded in the file format specified (PDF, unless otherwise indicated).
7. The following is a list of attachments to accompany the proposal. Note that not all attachments will be applicable to all Applicants, and that additional attachments not listed here must accompany Section 4. It is the responsibility of the applicant to ensure they submit all relevant attachments.
 1. Background check authorization;
 2. Course scope and sequence;
 3. Curriculum development plan;
 4. Exit standards for graduation;
 5. School calendar and schedule (including sample daily schedule);
 6. Enrollment policy;
 7. Discipline policy;
 8. Conversion support petitions;
 9. Evidence of community support;
 10. School leader resume and/or job description;
 11. Leadership team job descriptions and/or resumes;
 12. Governance documents;
 13. Organizational charts;
 14. Copies of Proposed Contracts
 15. Board member documents;
 16. Code of ethics and conflict of interest policy;
 17. ESP contract term sheet;
 18. Staffing chart;
 19. Leadership evaluation tools;

20. Teacher evaluation tools;
 21. Facility documents;
 22. Start-up plan;
 23. Financial plan workbook;
 24. Budget narrative; and
 25. Portfolio Summary.
8. When submitting resumes and biographies, label each document with the individual's affiliation with the proposed school (board member, principal, teacher, etc.);
 9. Review all elements of the Applicant Proposal for completeness before submitting;
 10. Late or incorrectly formatted submissions will not be accepted; and
 11. **All Proposals will be reviewed for eligibility and completeness before they are accepted and distributed to evaluation teams. If a Proposal is found to be incomplete or incorrectly formatted, the Applicant will have 24 hours to satisfactorily rectify the identified issues and resubmit their Proposal. Failing to rectify the issue(s) within the allotted time will result in rejection of the Proposal as ineligible for review; all Applicants are welcome to reapply in future years.**

Timeline

The article below represents the timeline for the 2014 RFP process. The deadlines and due dates are mandatory and nonnegotiable. ***Failure to meet the RFP submission deadline will result in disqualification from participation.*** All times are Pacific Daylight Time. The Commission reserves the right to revise the timeline; in the event of a change, it will be posted on the Commission's website and all Applicants will receive email notification.

Date	Activity
April 15, 2014	RFP Release Online Proposal portal launch. Proposals will only be accepted via upload to the Fluid Review online Proposal submission platform: http://wscsc-charterapp.fluidreview.com/
May 19 and June 18, 2014	Webinar orientation sessions. The sessions will provide interested groups with information about the RFP content and process, including a demonstration of the online Proposal portal. Applicants will have the opportunity to ask questions during these orientations.
April 29, 2014	Applicant questions and comments deadline
May 13, 2014	Commission's written answers to questions issued
June 13, 2014 5:00 p.m. PDT	Notice of Intent to Apply (NOI) due
June 16, 2014	Applicant complaints deadline
June 23, 2014	Commission's written response to Complaints issued
July 15, 2014 5:00 p.m. PDT	Proposal deadline
July 21, 2014	Completeness findings distributed
July 22, 2014 5:00 p.m. PDT	Deadline for corrections, only accepted via upload to http://wscsc-charterapp.fluidreview.com/
July 23, 2014	Final completeness determinations distributed
July 25, 2014	Deadline for eligible Applicants to deliver hard copies of Proposals
August 27-28, 2014	Capacity Interviews. Interviews will ONLY be held on these days; applicants are requested keep both dates entirely open in their calendars. Applicants will be notified of their assigned interview time as soon as possible. Due to significant logistical challenges, it is unlikely that any changes to assigned interview times will be possible
September 2-18, 2014	Public Forums
September 22, 2014	Draft Evaluation Team Recommendation Reports Released
September 29, 2014	Applicant Response to Draft Recommendation Report Due
October 3, 2014	Final Recommendation Report and Applicant Response Published
October 9, 2014	Commission decisions
October 13, 2014	Applicant request for optional debriefing due
October 14-31, 2014	Optional Applicant debriefings
Within five business days of debriefing	Deadline for filing Protest
December 11, 2014	Commission meeting for Contract approval/denial
January 7, 2015	Deadline for final contracts to be signed

Proposal Cover Sheet

Name of non-profit

Applicant entity: _____

Primary contact person: _____

Mailing address: _____

Street/PO Box: _____

City: _____ State _____ Zip _____

Phone Number: _____ day _____ evening _____

Fax Number: _____ Email: _____

Names, roles, and current employment of all members of the applicant team (add lines as needed):

Full Name	Current Job Title and Employer	Position with Proposed School

Does the applicant have charter school proposals under consideration by any other authorizer(s) in the United States? ☐ Yes ☐ No

If yes, complete the table below, adding lines as needed.

State	Authorizer	Proposed School Name	Proposal Due Date	Decision Date

Does the applicant have new schools scheduled to open elsewhere in the United States in the 2014-15 or 2015-16 school years? ☐ Yes ☐ No

If yes, complete the table below, adding lines as needed.

Proposed School Name	City	State	Opening Date

Does the applicant have new schools approved but scheduled to open in years beyond 2015-16?

☐ Yes ☐ No

If yes, complete the table below, adding lines as needed.

Authorizer	# of Schools	City	State	Opening Years

Proposed School Name	Opening Year	Geographic Community	Grades year 1	Grades at capacity

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Identification of Geographic Community may be as specific as a neighborhood or as general as a county targeted for school location; it must also include identification of the school district in which the school is located.

Does the applicant intend to contract or partner with a non-profit organization to provide school educational or management services? ☐Yes ☐No

If yes, identify the organization: _____

Does the school intend to partner or be affiliated with an existing or planned non-profit charter management organization (CMO) through which a single governing board governs or will govern multiple schools? ☐Yes ☐No

If yes, identify the organization: _____

If the answer to either of these questions is YES, include the organization’s portfolio in answering the above questions regarding pending applications and school openings.

Proposed Principal/Head of School Information:

Provide the following information, if known

Name of proposed principal candidate: _____

Current employment: _____

Phone Number: Day _____ Evening _____

Email: _____

School Enrollment Projections

Academic Year	Planned # of Students	Minimum # of Students	Maximum # of Students	Grade Levels Served
Year 1 (specify year)				
Year 2				
Year 3				
Year 4				
Year 5				
At Capacity (specify year)				

Executive Summary and Enrollment Projection (3 pages)

The Executive Summary should provide a concise summary of the following:

1. The proposed plan for the school;
2. The geographic and population considerations of the school environment;
3. The challenges particular to those considerations; and
4. The Applicant team's capacity to successfully open and operate a high quality school given the above considerations.

- 1. Mission, Vision, Objectives, and Goals.** State the mission and vision of the proposed school. The mission is a statement of the fundamental purpose of the school, describing why it exists. The vision statement outlines how the school will operate and what it will achieve long term. The mission and vision statement provide the foundation for the entire proposal. The objectives are operations and governance focused; they are the conditions that must exist in order for the school's goals to be realized.

The mission and vision statements, taken together, should:

- a. Identify the students and community to be served;
- b. Articulate the objectives and goals for the school;
- c. Illustrate what success will look like; and
- d. Align with the purposes of the Washington charter school law and the Commission's stated priorities for new schools.

- 2. Educational Need and Anticipated Student Populations.** Describe the anticipated student population, students' anticipated educational needs, and non-academic challenges the school is likely to encounter. Describe the rationale for selecting the location and student body. Identify any enrollment priorities the school intends to employ, consistent with applicable restrictions on enrollment eligibility and selection.
- 3. Education Plan/School Design.** Provide an overview of the education program of the proposed school, including major instructional methods and assessment strategies and non-negotiables of the school model. Describe the evidence that demonstrates the school model will be successful in improving academic achievement for the targeted student population. Summarize what the proposed school would do more effectively than the schools that are now serving the targeted population and how the school would achieve its goals.
- 4. Community Engagement.** Describe the relationships that the Applicant team has established to generate community engagement in and support for the proposed school, and how the Applicant team has assessed demand and/or solicited support for the school. Briefly describe these activities and summarize their results.

- 5. Leadership and Governance.** List the members of the school’s proposed leadership team and governing board, including their roles with the school and their current professional affiliation (add lines to this table as needed). Provide, as **Attachment 1**, the required criminal background check authorization for each of the individuals listed below.
- 6. Request of Additional Planning Year.** If the applicant is planning to open their school in the fall of 2016, please provide a rationale for this request. An applicant must describe the circumstances surrounding the proposed delay in opening the school.

Full Name	Current Job Title and Employer	Position with Proposed School

Enrollment Projection

1. Complete the following table, removing any rows for grades that the school will not serve. The number of students must include the minimum and maximum planned enrollment per grade per year.

Grade Level	Number of Students					
	Year 1 20__	Year 2	Year 3	Year 4	Year 5	At Capacity 20__
Pre-K						
K						
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						

2. Describe the rationale for the number of students and grade levels served in year one and the basis for the growth plan illustrated above.

Section 1. Educational Program Design and Capacity (25 pages)

Program Overview

Summarize the education program, including primary instructional methods and assessment strategies, and any non-negotiable elements of the school model. Briefly describe the evidence that promises success for this program with the anticipated student population. Highlight the culturally responsive aspects of the program.

Curriculum and Instructional Design

Propose a framework for instructional design that both reflects the needs of the anticipated population and ensures all students will meet or exceed the state standard.

1. Describe the basic learning environment (e.g., classroom-based, independent study), including class size and structure;
2. Give an overview of the planned curriculum. Identify course outcomes and demonstrate alignment with applicable state standards. Provide, as **Attachment 2**, a sample course scope and sequence for one subject in one grade of each division (elementary, middle, high school) the school will serve.
3. Evidence that the educational program or key elements of the program are based on proven methods; evidence that the proposed educational program has a sound base in research, theory, and/or experience, and has been or is likely to be rigorous, engaging, and effective for the anticipated student population;
4. If the curriculum is fully developed, summarize curricular choices such as textbook selection, by subject, and the rationale for each. Describe the evidence that these curricula will be appropriate and effective for the targeted students;
5. If the curriculum is not already developed, provide, as **Attachment 3**, a plan for how the curriculum will be developed between approval of the Proposal and the opening of the school, including who will be responsible and when key stages will be completed; and
6. Describe the primary instructional strategies that the school will expect teachers to use and why they are well-suited for the anticipated student population. Describe the methods and systems teachers will have for providing differentiated instruction to meet the needs of all students.

Student Performance Standards

Responses to the following items regarding the proposed school's student performance standards must be consistent with Common Core State Standards.

1. Describe the student performance standards for the school as a whole;
2. Provide the school's plan for using internal and external assessments to measure and report student progress;
3. If the school plans to adopt or develop additional academic standards beyond the state standards, provide an explanation of the types of standards (content areas, grade levels). Explain how the proposed standards exceed the state standards.
4. Explain the policies and standards for promoting students from one grade to the next. Discuss how and when promotion and graduation criteria will be communicated to parents/guardians and students; and
5. Provide, as **Attachment 4**, the school's exit standards for graduating students. These should clearly set forth what students in the last grade served will know and be able to do.

High School Graduation Requirements (High Schools Only)

1. Describe how the school will meet the requirements described in **Attachment 3**. Explain how students will earn credit hours, how grade-point averages will be calculated, what information will be on transcripts, and what elective courses will be offered. If graduation requirements for the school will exceed state standards, explain the additional requirements;
2. Explain how the graduation requirements will ensure student readiness for college or other postsecondary opportunities (e.g. trade school, military service, or entering the workforce); and
3. Explain the systems and structures the school will implement for students at risk of dropping out and/or not meeting the proposed graduation requirements.

School Calendar and Schedule

1. Discuss the annual academic schedule for the school. Explain how the calendar reflects the needs of the educational program. In **Attachment 5**, provide the school's proposed calendar for the first year of operation, including total number of days/hours of instruction at a minimum of 180 days; and
2. Describe the structure of the school day and week. Include the number of instructional hours/minutes in a day for core subjects such as language arts, mathematics, science, and social studies. Note the length of the school day, including start and dismissal times. Explain why the school's daily and weekly schedule will be optimal for student learning. Provide the minimum number of hours/minutes per day and week that the school will devote to academic instruction in each grade. Provide, also in **Attachment 5**, a sample daily and weekly schedule for each division of the school.

School Culture

1. Describe the culture of the proposed school. Explain how it will promote a positive academic environment and reinforce student intellectual and social development;
2. Explain how the school will create and implement this culture for students, teachers, administrators, and parents/guardians starting from the first day of school. Describe the plan for enculturating students who enter the school mid-year;
3. Explain how the school culture will take account of and serve students with special needs, including students receiving special education services, English Language Learners (ELLs), and any students at risk of academic failure;
4. Describe a typical school day from the perspective of a student in a grade that will be served in The first year of operation;
5. Describe a typical day for a teacher in a grade that will be served in the School's first year of operation.

Supplemental Programming

1. If summer school will be offered, describe the program(s). Explain the schedule and length of the program including the number of hours and weeks. Discuss the anticipated participants including number of students and the methods used to identify them. Describe the anticipated resource and staffing needs for these programs, and how they will be funded;
2. Describe the extra or cocurricular activities or programming the school will offer, how often they will occur, and how they will be delivered and funded;
3. Describe the programs or strategies the school will employ to address student mental, emotional, and social development and health; and
4. If applicable, describe any other student-focused activities and programs that are integral to the educational and student-development plans.

Special Populations and At-Risk Students

Schools are responsible for hiring licensed and endorsed special educators pursuant to law. School personnel shall participate in developing Individualized Education Programs (IEPs), identify and refer students for assessment of special education needs, maintain records, and cooperate in the delivery of special education instruction and services, as appropriate. All responses should indicate how the school will comply with applicable laws and regulations governing service to these student populations.

1. Describe the overall plan to serve students with special needs, including but not limited to students with IEPs or Section 504 plans, ELLs, students identified as intellectually gifted, and students at risk of academic failure or dropping out. The plan should address how the school will meet students' needs in the least restrictive environment;

2. Identify the special populations and at-risk groups that the school expects to serve and explain the basis for these assumptions. Discuss how the course scope and sequence, daily schedule, staffing plans, and support strategies and resources will meet or be adjusted for the diverse needs of students;
3. Explain more specifically how the school will identify and meet the learning needs of students with mild, moderate, and severe disabilities in the least restrictive environment possible. Specify the programs, strategies, and supports the school will provide, including the following:
 - a. Methods for identifying students with special education needs and avoiding misidentification;
 - b. Specific instructional programs, practices, and strategies the school will employ to provide a continuum of services, ensure students' access to the general education curriculum, and ensure academic success for students with special education needs;
 - c. Plans for monitoring and evaluating the progress and success of special education students with mild, moderate, and severe needs to ensure the attainment of each student's goals as set forth in the IEP;
 - d. Plans for promoting graduation for students with special education needs (*high schools only*); and
 - e. Plans to provide qualified staff adequate for the anticipated special needs population.
4. Explain how the school will meet the needs of English Language Learner (ELL) students, including the following:
 - a. Methods for identifying ELL students and avoiding misidentification;
 - b. Specific instructional programs, practices, and strategies the school will employ to ensure academic success and equitable access to the academic program for these students;
 - c. Plans for monitoring and evaluating the progress and success of ELL students, including exiting students from ELL services; and
 - d. Means for providing qualified staffing for ELL students.
5. Explain how the school will identify and meet the learning needs of at-risk students as defined RCW 28A.710.010(2):

"At-risk student" means a student who has an academic or economic disadvantage that requires assistance or special services to succeed in educational programs. The term includes, but is not limited to, students who do not meeting minimum standards of academic proficiency, students who are at risk of dropping out of high school, students in chronically low-performing schools, students with higher than average disciplinary sanctions, students with lower participation rates in advanced or gifted programs, students who are limited in English proficiency, students who are members of economically disadvantaged families, and students who are identified as having special educational needs.

6. Explain how the school will identify and meet the needs of highly capable students, including the following:
 - a. Specific research-based instructional programs, practices, strategies, and opportunities the school will employ or provide to enhance their abilities;

- b. Plans for monitoring and evaluating the progress and success of intellectually gifted students; and
- c. Means for providing qualified staffing for intellectually gifted students.

Student Recruitment and Enrollment

1. Explain the school's plan for student recruitment and marketing that is culturally inclusive and will provide equal access to interested students and families. Specifically describe the school's plan for outreach to at-risk students; and
2. Provide, as **Attachment 6**, the school's enrollment policy, which should be culturally inclusive and include the following:
 - a. Tentative dates for application period and enrollment deadlines and procedures, including explanation of how the school will receive and process Intent to Enroll forms;
 - b. A timeline and plan for student recruitment/engagement and enrollment;
 - c. The lottery procedures that will be used should student interest exceed capacity;
 - d. Policies and procedures for student waiting lists, withdrawals, reenrollment, and transfers; and
 - e. Explanation of the purpose of any preadmission activities for students or parents.

Student Discipline

1. Describe in detail the school's approach to student discipline. Provide, as **Attachment 7**, the school's proposed discipline policy. The proposed policy must be culturally responsive and comply with any applicable state laws and Commission policies. The plan should provide evidence that it is based on research, theory, experience, or best practice. The description of the school's approach and the proposed policy should address each of the following:
 - a. Equitable and fair practices the school will use to promote good discipline, including both penalties for infractions and incentives for positive behavior;
 - b. A list and definitions of the offenses for which students in the school must (where nondiscretionary) and may (where discretionary) be suspended or expelled, respectively;
 - c. An explanation of how the school will take into account the rights of students with disabilities in disciplinary actions and proceedings; and
 - d. Procedures for due process when a student is suspended or expelled as a result of a code of conduct violation, including a description of the appeal process that the school will employ for students facing expulsion and a plan for providing services to students who are expelled or out of school for more than ten days.
2. Discuss how students and parents/guardians will be informed of the school's discipline policy.

Conversion Schools

Proposed conversion schools must explain in detail the steps taken to engage the entire school community as well as the plan for continued stakeholder involvement.

1. Explain the plan to cultivate student and parent investment in the school turnaround, especially how the school plans to limit attrition from the existing student body.

2. Discuss specific ways that you will engage and transform the existing school culture during the pre-launch period and the first year of operation.
3. Provide, as **Attachment 8**, evidence of demonstrated support for the proposed conversion. Specifically, proposed conversion schools **MUST** provide a petition signed by a majority of teachers currently assigned to the school and/or a petition signed by a majority of parents of students currently attending the school.
4. Describe the applicant's prior experience in taking over or turning around an under-performing school.

Family and Community Involvement

1. Describe the role to date of any parents/guardians and community members involved in developing the proposed school. Include other evidence of parent/guardian and community support for the proposed charter school;
2. Describe what the school has done to assess and build parent/guardian and community demand for the proposed school and how the school will engage families and community members from the time that the school is approved through opening;
3. Describe how the school will engage parents/guardians in the life of the school. Explain the plan for building family-school partnerships that strengthen support for learning and encourage parental involvement. Describe any commitments or volunteer activities the school will seek from or offer to parents/guardians; and
4. Discuss the community resources that will be available to students and families. Describe any partnerships the school will have with community organizations, businesses, or other educational institutions. Specify the nature, purposes, terms, and scope of services of any such partnerships including any fee-based or in-kind commitments from community organizations or individuals that will enrich student learning opportunities. Include, as **Attachment 9**, existing evidence of support from intended community partners such as letters of intent/commitment, memoranda of understanding, and/or contracts.

Educational Program Capacity

1. Identify the key members of the school's leadership team. Identify *only* individuals who will play a substantial and ongoing role in school development, governance and/or management, and will thus share responsibility for the school's educational success. These may include current or proposed governing board members, school leadership/management, and any essential partners who will play an important ongoing role in the school's development and operation.
2. Describe the team's individual and collective qualifications for implementing the school design successfully, including capacity in areas such as:
 - a. School leadership, administration, and governance;
 - b. Curriculum, instruction, and assessment;
 - c. Performance management; and
 - d. Family and community engagement.

3. Describe the group's ties to and/or knowledge of the target community.
4. Identify any organizations, agencies, or consultants that are partners in planning and establishing the school, along with a brief description of their current and planned role and any resources they have contributed or plan to contribute to the school's development.
5. Identify the principal/head of school candidate and explain why this individual is well-qualified to lead the proposed school in achieving its mission. Summarize the proposed leader's academic and organizational leadership record. Discuss the evidence that demonstrates capacity to design, launch, and manage a high-performing charter school. If the proposed leader has never run a school, describe any leadership training programs that they have completed or are currently participating in. Provide, as **Attachment 10**, the qualifications, resume, and professional biography for this individual. Provide specific evidence of the leader's ability to effectively serve the anticipated population.

—OR—

If no candidate has been identified, discuss the process and timeline for recruiting, selecting, and hiring the school leader. Describe the criteria to be used in selecting this leader, and instead provide as **Attachment 10** a job description and qualifications for the school leader.

6. Describe the responsibilities of the school's leadership/management team beyond the principal/head of school. If known, identify the individuals who will fill these positions. For any positions not yet filled, explain the timeline, criteria, and process for recruitment and hiring. Provide, as **Attachment 11**, the qualifications, resumes, and professional biographies for the identified members of the leadership team, and for each position not yet filled, include job descriptions and qualifications.
7. Explain who is currently or will work on a full-time or nearly full-time basis following approval of the charter to lead development of the school and the plan to compensate these individuals.

Section 2. Operations Plan and Capacity (25 pages)

Legal Status and Governing Documents

1. Describe the proposed school's legal status, including non-profit status and federal tax-exempt status.
2. Submit, as **Attachment 12** the Articles of Incorporation, proof of non-profit status and tax exempt status (or copies of filings for the preceding items), a completed and signed Statement of Assurances, bylaws, and any other governing documents already adopted, such as board policies.

Organization Structure and Relationships

1. Submit, as **Attachment 13**, organization charts that show the school governance, management, and staffing plan and structure in:
 - a. The first year of school operations;
 - b. At the end of the charter term; and
 - c. When the school reaches full capacity, if in a year beyond the first charter term.

Each organization chart should clearly delineate the roles and responsibilities of, and lines of authority and reporting among, the governing board, staff, any related bodies (such as advisory bodies or parent/teacher councils), and any external organizations that will play a role in managing the school. The organization charts should also document clear lines of authority and reporting within the school.

2. Describe any other proposed partnerships or contractual relationships that will be central to the school's operations or mission. Provide, as **Attachment 14**, copies of the proposed contract(s)

Governing Board

1. Explain the governance philosophy that will guide the board, including the nature and extent of involvement by key stakeholder groups.
2. Describe the governance structure of the proposed school, including the primary roles of the governing board and how it will interact with the principal/head of school and any advisory bodies. Describe the size, current and desired composition, powers, and duties of the governing board. Identify key skills, areas of expertise, and constituencies that will be represented on the governing board.
3. Explain how this governance structure and composition will help ensure that:
 - a. The school will be an educational and operational success;
 - b. The board will evaluate the success of the school and school leader; and
 - c. There will be active and effective representation of key stakeholders, including parents.
4. List all current and prospective board members and their intended roles. For each individual identified, summarize interests in and qualifications for serving on the school's board. In **Attachment 15**, provide the following documents for each individual identified here: a completed and signed board Member Information Sheet, resume, and professional biography.

5. Explain the procedure by which board members have been and will be selected. Describe how often the board meets. Discuss the plans for any committee structure.
6. Describe plans for increasing the capacity of the governing board. Discuss how the board will expand and develop over time. Describe how new members be recruited and added, and how vacancies will be filled. Discuss the orientation or training new board members will receive, and the kinds of ongoing development existing board members will receive. The plan for training and development should include a timetable, specific topics to be addressed, and participation requirements.
7. If the current Applicant team does not include the initial governing board, explain how and when the transition to the formal governing board will take place.
8. If this application is being submitted by an existing non-profit organization whose core mission is NOT the operation of charter schools, respond to the following:
 - a. Will the existing non-profit board govern the new school, or will the school be a new non-profit corporation governed by a separate board?
 - b. If the current non-profit's board will govern the charter school, what steps have been taken to transform its board membership, mission, and bylaws to assume its new duties? Describe the plan and timeline for completing the transition and orienting the board to its new duties.
 - c. If a new board has been formed, describe what, if anything, its ongoing relationship to the existing non-profit's board will be.
9. Describe the board's ethical standards and procedures for identifying and addressing conflicts of interest. Provide, as **Attachment 16**, the board's proposed Code of Ethics and Conflict of Interest policy. Identify any existing relationships that could pose actual or perceived conflicts if the application is approved. Discuss specific steps that the board will take to avoid any actual conflicts and to mitigate perceived conflicts.

Advisory Bodies

1. Describe any advisory bodies or councils to be formed, including the roles and duties of each. Describe the planned composition of the advisory body; the strategy for achieving that composition; the role of parents/guardians, students, and teachers (as applicable); and the reporting structure as it relates to the school's governing body and leadership.

Grievance Process

1. Explain the process that the school will follow should a parent or student have an objection to a governing board policy or decision, administrative procedure, or practice at the school.

District Partnerships

1. Explain any proposed partnership agreement between the charter school and the school district or Education Service District (ESD) where the school is proposed to be located. Include the terms of that agreement.

Education Service Providers (ESP) and Other Partnerships

Describe any other proposed partnerships or contractual relationships that will be central to the school's operations or mission.

If the school intends to contract with an ESP for the management of the school or substantial educational services, address the following:

1. Provide evidence of the nonprofit ESP's success in serving student populations that are similar to the targeted population, including demonstrated academic achievement as well as successful management of nonacademic school functions, if applicable;
2. As **Attachment 17**, provide a term sheet that includes:
 - a. Proposed duration of the service contract;
 - b. Roles and responsibilities of the governing board, school staff, and ESP;
 - c. Scope of services and resources to be provided by the ESP;
 - d. Performance evaluations measures and timelines;
 - e. Compensations structure, including clear identification of all fees to be paid to the ESP;
 - f. Methods of contract oversight and enforcement;
 - g. Investment disclosure; and
 - h. Conditions for renewal and termination of the contract
3. Disclose and explain any existing or potential conflicts of interest between the charter school board and proposed service provider or any affiliated business entities.

Staff Structure

1. Provide, as **Attachment 18**, a completed staffing chart for the school, prepared using the template provided by the Commission. The staffing chart and accompanying notes or roster should identify the following:
 - a. Year one positions, as well as positions to be added during the first charter term;
 - b. Administrative, instructional, and non-instructional personnel;
 - c. The number of classroom teachers, paraprofessionals, and specialty teachers; and
 - d. Operational and support staff.
2. Explain how the relationship between the school's senior administrative team and the rest of the staff will be managed, including plans for performance management. Note the teacher-student ratio, as well as the ratio of total adults to students for the school.

Staffing Plans, Hiring, Management, and Evaluation

1. Explain the relationship that will exist between the proposed charter school and its employees, including whether the employees will be at-will and whether the school will use employment contracts. If the school will use contracts, explain the nature and purpose of the contracts;
2. Outline the proposed school's salary ranges and employment benefits for all employees, as well as any incentives or reward structures that may be part of the compensation system. Explain the school's strategy for retaining high-performing teachers;

3. Describe the school's strategy, plans, and timeline for recruiting and hiring the teaching staff, in accordance with the state accountability plan. Explain other key selection criteria and any special considerations relevant to the school's design;
4. Outline the school's procedures for hiring and dismissing school personnel, including conducting criminal background checks;
5. Explain how the school leader will be supported, developed, and evaluated each school year. Provide, as **Attachment 19**, any leadership evaluation tool(s) that the Applicant team has identified or developed already; and
6. Explain how teachers will be supported, developed, and evaluated each school year in accordance with the state accountability plan. Provide, as **Attachment 20**, any teacher evaluation tool(s) that already exist for the school, or state if the school intends to follow the state teacher evaluation plan.

Professional Development

Describe the school's professional development expectations and opportunities, including the following:

1. Identify the person, position, or organization responsible for professional development;
2. Discuss the core components of professional development and how these components will support effective implementation of the educational program. Discuss the extent to which professional development will be conducted internally or externally and will be individualized or uniform;
3. Provide a schedule and explanation of professional development that will take place prior to school opening. Explain what will be addressed during this induction period and how teachers will be prepared to deliver any unique or particularly challenging aspects of the curriculum and instructional methods; and
4. Describe the expected number of days/hours for professional development throughout the school year, and explain how the school's calendar, daily schedule, and staffing structure accommodate this plan. Include time scheduled for common planning or collaboration in this discussion and explain how this time will typically be used.

Performance Framework

The Commission will evaluate the performance of every charter school annually and for renewal purposes according to the performance framework. Per Washington Administrative Code (WAC) 108-30, the performance framework is a set of academic, financial, and organizational performance standards. The academic performance standards will consider status, growth, and comparative performance based on federal, state, and school-specific measures. The financial performance standards will be based on standard accounting and industry standards for sound financial operation. The organizational performance standards will be based primarily on compliance with legal obligations, including fulfillment of the governing board's fiduciary obligations related to sound governance.

Applicants may propose to supplement the Commission’s performance framework with school-specific academic and organizational goals. The Commission encourages Applicants to closely examine the performance framework, and they are invited to incorporate the performance framework into their educational and organizational performance systems.

1. Describe any mission-specific educational goals and targets that the school will have. State goals clearly in terms of the measures or assessments the school plans to use.
2. Describe any mission-specific organizational goals and targets that the school will have. State goals clearly in terms of the measures or assessments the school plans to use.
3. In addition to all mandatory assessments, identify the primary interim assessments the school will use to assess student learning needs and progress throughout the year. Explain how these interim assessments align with the school’s curriculum, performance goals, and state standards.
4. Explain how the school will measure and evaluate academic progress (of individual students, student cohorts, and the school as a whole) throughout the school year, at the end of each academic year, and for the term of the charter contract.
5. Explain how the school will collect and analyze student academic achievement data, use the data to refine and improve instruction, and report the data to the school community. Identify the person(s), position(s), and/or entities that will be responsible and involved in the collection and analysis of assessment data.
6. Identify the individual or position responsible for managing the data, interpreting it for classroom teachers, and leading or coordinating professional development to improve student achievement.
7. Explain the training and support that school leadership and teachers will receive in analyzing, interpreting, and using performance data to improve student learning.

Facilities

Charter school facilities must comply with applicable state and local health and safety requirements. In addition, charter school Applicants must be prepared to follow applicable city planning review procedures.

1. Describe the basic facilities requirements for accommodating the school as proposed, including number of classrooms, square footage per classroom, common areas, overall square footage, and amenities.
2. Explain anticipated specialty classroom needs, including the number of each type and the number of students to be accommodated at one time. Specialty needs may include but are not limited to the following: science labs, art room, computer labs, library/media center, performance/dance room, auditorium, etc.

3. Describe anticipated administrative/support space needs, including anticipated number of each: main office, satellite office, work room/copy room, supplies/storage, teacher work rooms, etc.
4. Explain which, if any, of the following are essential to fulfillment of the core athletic program: gymnasium, locker rooms, weight rooms, field(s) (football, soccer, multipurpose), baseball/softball field, etc.
5. Identify any other significant facilities needs not already specified, for example: playground, large common space, other special considerations (identify and explain).
6. Describe the process for identifying and securing a facility, including any brokers or consultants the Applicant is employing to navigate the real estate market, plans for renovations, timelines, financing, etc.
7. If the Applicant currently holds a facility or has an MOU or other proof of intent to secure a specific facility, briefly describe the facility including location, size, and amenities.
 - a. Provide proof of the commitment as **Attachment 21**.
 - b. **Attachment 21** may also include up to 10 pages of supporting documents providing details about the facility.

Start-Up and Ongoing Operations

1. Provide, as **Attachment 22**, a detailed start-up plan for the school, specifying tasks, timelines, and responsible individuals. This plan should align with the start-up budget.
2. Describe the transportation arrangements for prospective students. In addition to daily transportation needs, describe how the school plans to meet transportation needs for field trips and athletic events.
3. Summarize the plan for safety and security for students, the facility, and property. Explain the types of security personnel, technology, equipment, and policies that the school will employ.
4. Outline the plans for food service and other significant operational or ancillary services.

Operations Capacity

1. Describe the Applicant team's individual and collective qualifications for implementing the Operations Plan successfully, including capacity in areas such as the following:
 - a. Staffing;
 - b. Professional development;
 - c. Performance management;
 - d. General operations; and
 - e. Facilities management.

2. Describe the organization's capacity and experience in facilities acquisition and management, including managing build-out and/or renovations, as applicable.

Section 3. Financial Plan and Capacity (15 pages)

Financial Plan

1. Describe the systems, policies, and processes the school will use for financial planning, accounting, purchasing, and payroll, including a description of how it will establish and maintain strong internal controls and ensure compliance with all financial reporting requirements;
2. Describe the roles and responsibilities of the school's administration and governing board for school finances and distinguish between each;
3. Describe the school's plans and procedures for conducting an annual audit of the financial and administrative operations of the school;
4. Describe how the school will ensure financial transparency to the Commission and the public, including its plans for public adoption of its budget and public dissemination of its annual audit and an annual financial report;
5. Describe any services to be contracted, such as business services, payroll, and auditing services, including the anticipated costs and criteria for selecting such services;
6. Describe the school's plans for liability insurance to indemnify the school, its board, staff, and teachers against tort claims;
7. Submit a completed Financial Plan Workbook as **Attachment 23**. Be sure to complete all sheets in the Workbook. In developing the budget, please use the per-pupil revenue guidance provided by the Commission; and
8. As **Attachment 24**, present a detailed budget narrative including description of assumptions and revenue estimates, including but not limited to, the basis and calculations for revenue projections, staffing levels, and expenditures. The narrative response should specifically address the degree to which the school/campus budget will rely on variable income (e.g., grants, donations, fundraising).
 - a. Anticipated Funding Sources. Indicate the amount and sources of funds, property or other resources expected to be available through banks, lending institutions, corporations, foundations, grants, etc. Include evidence of commitment for any funds on which the school's core operation depends in **Attachment 24**;
 - b. Discuss the school's contingency plan to meet financial needs if anticipated revenues are not received or are lower than estimated; and
 - c. Describe in detail the year one cash flow contingency, in the event that revenue projections are not met in advance of opening.

Financial Management Capacity

1. Describe the Applicant team's individual and collective qualifications for implementing the Financial Plan successfully, including capacity in areas such as the following:
 - a. Financial management;
 - b. Fundraising and development; and
 - c. Accounting and internal controls.

Section 4. Existing Operators (10 pages)

Applicants who already operate one or more schools, including charter management organizations (CMOs), as well as applicants proposing to contract with ESPs must respond to the following questions:

1. Provide a detailed description of the organization's growth plans and capacity to successfully support and execute that plan including business plans to support anticipated growth.
2. Using the *Portfolio Summary Template*, complete all requested information for each of the organization's schools and provide as **Attachment 25**.
3. Disclose schools that have been closed or non-renewed, or charters that have been revoked.